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Illicit drug traffic and supply: world situation with regard to drug trafficking and reports of subsidiary bodies of the Commission

World situation with regard to illicit drug trafficking and action taken by the subsidiary bodies of the Commission on Narcotic Drugs

Report of the Secretariat

Summary

The present report provides an overview of global trends and patterns in illicit drug production and trafficking and of the action taken by the subsidiary bodies of the Commission on Narcotic Drugs in 1999.

The global supply of cocaine remained stable in 1999, but that of heroin increased substantially because of the large increase in opium production in Afghanistan. Trafficking patterns and trends, as reflected in seizure statistics provided up to 1998 in the annual reports questionnaires, indicate an increase in the interdiction of cocaine, heroin, cannabis resin and amphetamine-type stimulants. Most of the increase relates to the established producer, transit and consumer areas, rather than to emerging markets for illicit substances.

* E/CN.7/2000/1.

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I. Introduction

1. The present report provides an overview of the latest trends in illicit drug production and trafficking at the global and regional levels, and summarizes information received from Governments in the annual reports questionnaires. Reference is made to opiates, coca, cannabis and psychotropic substances and a brief update is provided on cultivation and production of drugs, patterns and trends in drug trafficking, global interception rates, availability of drugs to the world market and farm-gate and street prices.

2. The information presented is drawn mainly from the annual reports questionnaire relating to 1998, submitted by Governments to the United Nations International Drug Control Programme (UNDCP). For the analysis of trends, questionnaires submitted for previous years were also used as a source of data. The return rate for the questionnaires significantly increased for 1998, the latest available reporting year. A total of 114 questionnaires had been received by 10 December 1999, and a few more were expected to arrive, while less than 100 had been submitted on average in previous years.

3. Where annual reports questionnaires did not provide sufficient information, the following sources were used to supplement data gaps: the International Criminal Police Organization (Interpol), the Customs Cooperation Council (also known as the World Customs Organization) and the International Narcotics Control Board.

4. Despite the increased number of questionnaires received by UNDCP from Governments, a number of limitations exist with regard to the resulting data. The most important shortcomings concern the quantity and quality of the information provided. First, the replies submitted are not always comprehensive. For example, certain essential information on illicit drug trafficking is frequently missing. Secondly, the comparability of data received is often limited. Thirdly, there are inherent difficulties regarding seizure data, when reports are submitted by some countries and not by others. That may give the impression that the countries not submitting reports are drug-free, even though in reality they may be affected by drug trafficking.

5. The present report was also prepared in response to the request of the General Assembly, in its resolution 54/132, that UNDCP include in its report on illicit traffic in drugs an updated assessment of worldwide trends in illicit traffic and transit in narcotic drugs and psychotropic substances, including methods and routes used, and to recommend ways and means of improving the capacity of States along those routes to deal with all aspects of the drug problem. The present report will be complemented by a presentation by UNDCP at the forty-third session of the Commission on Narcotic Drugs under the relevant agenda item.

II. Summary of worldwide trends in illicit traffic

6. Global illicit production of opium increased significantly in 1999, reaching a record level of almost 6,000 tons. That was mostly due to an enormous increase in production of opium in Afghanistan, prompted by increased cultivation, relatively high farm-gate prices during the growing season and favourable weather.[1] Afghanistan accounted for more than 75 per cent of the illicit opium produced worldwide in 1999. Illicit cultivation and production seem, on the other hand, to have slightly declined in Myanmar during 1999, and to have remained relatively small-scale in other countries, such as Colombia, the Lao People's Democratic Republic and Mexico.

7. Illicit production of coca leaf remained relatively stable throughout the past decade, leading to the potential global manufacture of an estimated 900 tons of cocaine in 1999. Illicit cultivation and production in Colombia continued to increase, accounting for approximately two thirds of the global production level for 1999. In Peru, eradication efforts, which have been increasingly strengthened in recent years, continued in 1999. On the other hand, large abandoned areas of former cultivation were reactivated in response to an increase in farm-gate prices of dried coca leaf.[2] As a result, the production level in 1999 was estimated to have remained relatively stable. Following the trend of recent years, farm-gate prices in Bolivia were also rising although production seemed to have significantly declined. Farm-gate prices of coca leaf and coca base were also on the rise in Colombia and Peru.

8. With regard to trafficking, since seizure statistics for 1999 are not yet available, trends are described up to 1998. Hence, the changes in the production of drugs over the last 12 months are not reflected in the trafficking trends presented. Globally reported cocaine seizures, which were relatively stable throughout the 1990s, mirroring stable trends in coca leaf production, reflected a significant increase in 1998, reaching a record level. Globally reported seizures of heroin, which have been rising moderately for

decades, continued to increase, and also reached an unprecedented level.

9. The increases in global seizure volumes of both cocaine and heroin were not attributable to trends in emerging consumer markets (that is, the markets for cocaine in western Europe and heroin in North America), but to effective law enforcement interventions in traditional source, transit and consumer areas. The most significant increase in cocaine seizures occurred in Colombia. Heroin seizures rose particularly in China, the Islamic Republic of Iran, the Netherlands and Turkey, while reported interceptions declined in India and Pakistan.

10. Global interception rates for both heroin and cocaine seizures were exceptionally high in 1998. Production levels of both drugs remained relatively stable compared to the previous year, but seizure volumes increased. The heroin interception rate was calculated at 17 per cent, as against a normal annual average of just above 10 per cent, and that for cocaine at roughly 40 per cent, compared to a normal average of approximately 33 per cent.

11. In the United States of America,[3] trends observed in recent years continued with respect to both drug types. Heroin seizures continued to rise moderately, while those for cocaine remained stable, though at their highest recorded level.

12. In western Europe, the trend in seizures in 1998 showed a slight reversal compared with trends of recent years. Heroin seizures, which had been stable for several years, showed a new increase, while the rising trend for cocaine observed throughout the 1990s unexpectedly turned into a decline. That may, however, have been only a one-year fluctuation rather than a change in trafficking trends, since the latest available figures for 1999 indicated a large increase in cocaine seizures in some western European countries, even though final regional totals are not yet available. Countries in western Europe reflecting the biggest changes in 1998 were the Netherlands and Turkey, both of which recorded large increases in seizures of both drugs, as well as Spain, where seizures of cocaine and heroin declined.

13. The main transit countries affected by the trafficking of opium and heroin from south-west Asia to western Europe remain the Islamic Republic of Iran, Turkey and other countries along the various Balkan routes. Another subregion used is central Asia. An important transit zone seems to be the border areas between Afghanistan, the Islamic Republic of Iran and Turkmenistan. The southward trafficking route from Afghanistan across Pakistan and sometimes on through India has become slightly less active, though the bulk of heroin seizures relating to trafficking by air and sea continues to indicate that Pakistan was being used as a trafficking route. As for trafficking trends in south-east Asia, the large increases in heroin seized in China in 1997 and 1998 seem to confirm a shift in trafficking to or through that country. The North American heroin market is supplied by south-east Asia and Latin America, particularly Colombia and Mexico.

14. The most reported trafficking methods for cocaine are by sea or by air, the latter means naturally involving smaller quantities. The only land route used to transport cocaine to the major consumer markets is through Mexico, though in terms of seizures the use of that route seems to be decreasing. However, the extent to which certain trafficking routes or transit areas are used remains unclear. Assumptions could not be confirmed, for example, as to what extent western Europe is supplied from the different source countries. Cocaine entry points in Europe may have partly shifted, as indicated by the large decreases in seizures in Portugal and Spain and by increases in the Netherlands, Turkey and eastern Europe. Seizure statistics for 1998 for the Netherlands and Turkey appear to indicate that they are increasingly used as entry points and transit countries for both cocaine and heroin.

15. Despite wide price ranges between different communities, markets and countries in the United States and western Europe, the average price of cocaine and heroin, at both wholesale and retail levels, has declined in recent years. That trend continued in 1998, though the falling price pattern appeared less distinct.

16. As with cocaine and heroin, global seizures of cannabis resin showed a renewed increase in 1998, after relative stability in 1996 and 1997. The most significant increase again occurred in the largest consumer area, western Europe (particularly in Spain). However, the two principal source regions, south-west Asia and north Africa, showed decreases, particularly in Pakistan. Cannabis herb appears to be the only main drug type for which there was no increase in global seizure volumes. The seizure level of cannabis herb has levelled off since 1995. North America continues to record about two thirds of global seizures of cannabis herb by volume.

17. Amphetamine-type stimulants continue to be a major concern in east and south-east Asia, western Europe and North America. Global seizures of stimulants have risen rapidly throughout the 1990s, markedly since 1996. Figures

for 1998 reached record levels. The global trend towards the illicit manufacture of amphetamine-type stimulants has also risen sharply since 1996. Data received on the detection of clandestine laboratories confirm that methamphetamine is manufactured, trafficked and consumed in east and south-east Asia and North America, while Europe remains the major region for the manufacture, trafficking and consumption of amphetamine and Ecstasy-type substances.

III. Illicit opium production in 1999 and potential availability of heroin to the world market

18. Global illicit production of opium increased by more than one third in 1999, reaching a record level of almost 6,000 tons. That unprecedented production peak was mostly due to the large increase in Afghanistan, which currently accounts for more than 75 per cent of world opium production. Production in Myanmar appeared to have sightly decreased in 1999, accounting for approximately 17 per cent of the global total. The level of production in other countries in Asia and Latin America remained almost negligible compared to the two main producer areas, and latest estimates indicated stable trends in1999 (see figure I).

19. During the 1998/99 growing season, an estimated 90,983 hectares of opium poppy were cultivated in Afghanistan.[4] That unprecedented level of cultivation represented an increase of approximately 43 per cent over the previous season. The most significant increase was in the biggest producer province, Helmand, which is located in the south of the country, and where almost 50 per cent of the total Afghan opium originated. There was also an increase in the second largest producer region, Nangarhar, in the east of the country, which currently accounts for more than 25 per cent of the total opium production of Afghanistan.

20. An estimated 4,581 tons of opium were produced in Afghanistan in 1999. Though the originally estimated very low yield for 1998 was later revised upwards, the 1999 production peak still suggested an increase of 70 per cent between 1998 and 1999. Climatic factors had a significant impact on the two harvest periods. The year 1998 saw considerable crop damage as a result of unseasonal rains. On the other hand, weather conditions in 1999 were favourable to opium production, resulting in an improved yield.

21. Favourable weather conditions for the 1999 harvest were not the only reason for the large increase in production. The scale of cultivation also increased, though to a lesser extent than that of production. The expansion of the cultivation area was prompted by the drop in production during the previous growing season (1998), which had resulted in a financial loss for farmers. During the following planting season, the increase in prices resulting from the shortage of opium from the 1998 harvest provided a further incentive for farmers to expand the cultivation area to make up for their losses. Thus, higher prices, increased cultivation areas and conducive weather conditions were the main reasons for the enormous rise in opium production in Afghanistan in 1999.

22. If the same socio-economic and ecological conditions prevailed during the current opium-growing season in Afghanistan, a reduction in opium cultivation could be anticipated in 2000. Farmers had a profitable harvest in 1999, and opium farm-gate prices fell. That may prompt a reduction in poppy cultivation. However, the actual production level, which is also largely dependent on the weather, remains unclear.

23. In 1999, fresh opium prices at harvest time ranged from the equivalent of 27 to 72 United States dollars ($) per kilogram. The value of total opium production in Afghanistan in 1999, at farm-gate level and harvest time, was estimated at approximately $183 million. In 1998, fresh opium was sold at between $28 to $91 at harvest time.

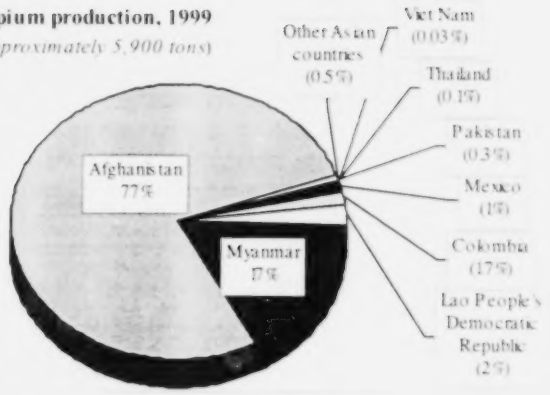
24. In Myanmar, cultivation was estimated to have decreased from approximately 130,300 hectares in 1998 to less than 100,000 in 1999. Consequently, production fell from 1,300 tons in 1998 to less than 1,000 tons in 1999.

25. The total quantity of opium produced illicitly in 1999 would be sufficient to manufacture almost 600 tons of heroin. Even with the deduction of the average quantity of seizures of opiates (opium, morphine and heroin), an unprecedented 500-530 tons of opiates (in heroin equivalent[5]) would be available to the world market. In 1998, the potential availability of heroin amounted to 360 tons (in heroin equivalent).

Figure I

Global opium production, 1999

(Total: approximately 5,900 tons)



IV. Trends in heroin trafficking

26. The following seizure trends relate to 1998 (which is the latest available reporting year based on the annual reports questionnaire) and previous years. Thus, most recent increases in opium production in 1999 could not be taken into account in presenting the latest heroin trafficking trends. In that context, seizure statistics described in the present report mostly refer to quantities seized rather than to the number of seizure cases, the latter being insufficiently reported.

27. Global seizures of heroin amounted to 33.2 tons in 1998, a slight increase over 1997 (32.6 tons) and the highest level ever reached. Though increases at the global level have been relatively small in recent years, the rising trend is continuing. The biggest increases during 1998 were reported by China, the Islamic Republic of Iran, the Netherlands, Turkey and several countries in eastern Europe. By contrast, particularly large decreases were recorded by India and Pakistan.

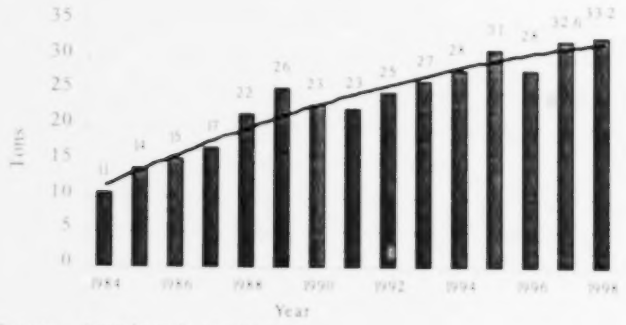
28. The global interception rate is calculated as a percentage share of all recorded opiate seizures (relating to opium, morphine and heroin) when considered against the total assessed production figure for the year. In 1998, the rate climbed to an unprecedented level of 17 per cent (an increase in seizures together with a slight decrease in opium production). Generally, the interception rate for opiates ranges between 10 and 15 per cent.

29. Data on methods of transportation used for trafficking of opiates seem to explain why the interception rate for opiates should be lower than that for cocaine. The bulk of opiates continues to be transported by road and generally involves smaller quantities than sea freight. In 1998, almost 80 per cent of heroin seizures appeared to relate to trafficking by road (where data on means of transportation were available). Air and sea transportation each accounted for roughly 10 per cent, while trafficking by rail and mail systems was insignificant in terms of quantities smuggled, though the number of seizures relating to trafficking by mail seemed to have risen. The largest quantities involving to road transport were reported from the Islamic Republic of Iran and Turkey, while seizures relating to air and sea occurred primarily in India, Pakistan and Thailand.

30. The volume of heroin seized globally was less than 10 tons in the early 1980s, but increased to 25 tons by the end of that decade. That level seemed to be generally maintained during the early 1990s (when seizures remained stable in Asia while continuing to rise in Europe and North America. The middle and late 1990s have, however, seen new rises, reaching more than 30 tons in recent years. Increases have been particularly notable in Asia and, to a lesser extent, North America. In Europe, annual seizures remained stable (around 10 tons) between 1994 and 1997, but showed a renewed increase in 1998 (13.6 tons) (see figure II).

Figure II

Global heroin seizures, 1984-1998



Sources: Annual reports questionnaires and other sources.

31. In south-west Asia and neighbouring subregions, the countries that continue to report the biggest quantities of heroin seizures, and that together account for approximately 40 per cent of the global seizure volume, include India, the Islamic Republic of Iran, Pakistan and Turkey. In 1998, seizures in the Islamic Republic of Iran and in Turkey increased significantly, reaching record levels in both countries (2.9 and 4.7 tons, respectively). In addition, seizures of morphine in the Islamic Republic of Iran, which accounts for more than 90 per cent of the global volume, also increased considerably during that year. Heroin seizures in India and Pakistan, however, decreased substantially in 1998, reaching their lowest levels for many years (0.6 and 3.4 tons, respectively).

32. The seizure trends described above indicate that the trafficking route following the western direction and bringing drugs from Afghanistan through the Islamic Republic of Iran and Turkey remains the dominant route for the transportation of opiates from the region of the Golden Crescent to western Europe, mainly via the traditional Balkan route and its various subsidiaries. The southern direction, via Pakistan and India, seems to have become secondary, though Pakistan formerly recorded by far the biggest seizure quantities worldwide (see figure III).

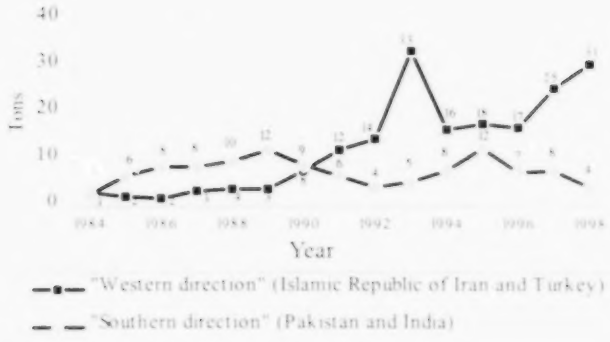
33. The apparent shift away from the use of the southern direction, via Pakistan, might result from the opening-up in recent years of the route involving the "northern direction", via States of central Asia, which have been exposed to increased drug trafficking in recent years. Though seizures remain relatively low in those States, some available data indicate intensified trafficking activity in the subregion. Turkmenistan, for example, recorded 0.5 tons in 1998 and 1.9 tons in 1997. Uzbekistan and Tajikistan also recorded increases in 1998, reaching 200 and 270 kilograms, respectively. Heroin seizures in Kazakhstan and Kyrgyzstan, however, have remained low. In that context, it seems likely that the western and northern directions, as described above, are connected, perhaps through the border between the Islamic Republic of Iran and Turkmenistan and the route of access (via the countries in the region of the Caucasus) to Turkey. Thus, the increase in seizures along the western route (in the Islamic Republic of Iran and Turkey) may now also be related to its links with States of central Asia, notably Turkmenistan.

34. Other countries in the Near and Middle East and in south-west Asia that reported heroin seizures in 1998, in quantities ranging from 20 to 140 kilograms, included Israel, Jordan, Kuwait, Saudi Arabia, the Syrian Arab Republic and the United Arab Emirates.

35. In south Asia, the only country other than India that regularly recorded heroin seizures was Sri Lanka. Seizures in that country, though at a relatively low level, have slightly increased in recent years, amounting to 57 kilograms in 1998.

36. In east and south-east Asia, the most marked increase with respect to heroin seizures was noted in China, which consistently increased its seizures in recent years to a record level of 7.4 tons in 1998. China currently accounts

Figure III.
Heroin and morphine seizures by trafficking route, 1984-1998



Sources: Annual reports questionnaires, and other sources.

for more than 80 per cent of total heroin seizures in east and south-east Asia. Annual seizures in Thailand have concerning a northward shift of trafficking from Myanmar, across its border with China, rather than through Thailand been of the order of 0.5 tons since 1995, although previously between 1 and 2 tons were generally seized. Such data further confirm reports received in recent years.

37. Heroin seizures by Myanmar, which climbed to 1.4 tons in 1997, fell back in 1998 to 0.4 tons, the average level of previous years. Other countries in the subregion that recorded seizures of between 30 and 300 kilograms in 1998 included, in the order of quantities seized, Malaysia, Singapore, Viet Nam and Indonesia.

38. Interceptions in Australia were relatively high in 1997 and 1998, totalling roughly 300 kilograms, compared to previous levels that ranged between 50 and 250 kilograms. This is in line with the small increase in consumption reported by the country.

39. Despite the fact that a record number of annual reports questionnaires were received from African countries in 1998, total quantities of reported heroin seizures in that region remained low. That may, however, be less a reflection of the true heroin trafficking and consumption picture in the continent, than of the current capacities of many of its national drug control agencies.

40. Heroin seizures in Europe showed a renewed increase in 1998, after a relatively stable trend between 1994 and 1997. This increase was mainly due to Turkey, the Netherlands and several countries in central and eastern Europe. Countries in that subregion that recorded relatively high volumes of seized heroin in 1998 included the Czech Republic, Hungary and Romania, as well as the Russian Federation.

41. Western Europe accounts for one third of global heroin seizures by volume. Though seizures in many western European countries have declined in recent years, the enormous amount seized in the Netherlands in 1998 outweighed that trend. Seizures in the Netherlands, like elsewhere in western Europe, had been generally decreasing until 1997, when they amounted to less than 200 kilograms, but they climbed to 2.1 tons in 1998. Other countries in western Europe, such as Germany, Italy and Spain, showed a slight decrease in the volume of heroin seized in recent years, particularly in 1997 and 1998. Recent declines were also observed in France and Belgium.

42. A rising trend is observed in Turkey and in various countries of western Europe, including the United Kingdom of Great Britain and Northern Ireland and, to a lesser extent, Switzerland. The United Kingdom recorded an annual average of 600 kilograms between 1990 and 1994, more than 1 ton in both 1995 and 1996 and more than 2 tons in 1997. In 1998, however, seizures (according to preliminary figures) dropped to 1.3 tons. Seizures continue to rise in the Nordic countries. Levels of heroin

seizures in Austria and Greece have sightly fluctuated throughout the 1990s, though showing a rising trend in Austria since 1995.

43. The somewhat differing trends in western European countries may partly be related to political changes with regard to border control. Countries that appear to be major European entry points, such as Turkey or the Netherlands, or those that are outside the Schengen area, such as the United Kingdom and Switzerland, seem to record high volumes and/or rising trends, while elsewhere decreases have been recorded. In general, however, the total quantities seized in western Europe have been relatively stable in recent years (matching trends in consumption), and even increased in 1998. The exception might be the Nordic countries, which seem to have experienced continued increases in both consumption and seizures in recent years.

44. In the Americas, seizures of heroin continue to rise, totalling 2.1 tons in 1998, as compared to 1 ton at the beginning of the 1990s and half a ton during the mid-1980s. The United States, which on average accounts for 75 per cent of the regional seizure level, recorded 1.6 tons in 1998, which was only marginally higher than in the previous year, but which maintained the consistent rise since the 1980s. Seizures in Mexico declined in 1997 and 1998, while those in Colombia increased. That seems to confirm reports in recent years that the heroin available in the Americas increasingly originates in Colombia. However, the percentage share of heroin from American source countries available in North American markets, as compared to that from south-east Asia, remains unclear. The only other countries in the region that recorded heroin seizures in 1998, though in relatively small quantities, include, in the order of volume seized, Ecuador, Argentina and Canada (see figure IV).

45. Heroin prices,[5] which were falling in both the United States and western Europe over the past decade, continued to show a slight downward trend in 1998. Patterns of decline were more or less similar at retail and wholesale levels in recent years. Thus, price differences between western Europe and the United States, as well as between wholesale and retail levels, remained more or less unchanged. In addition, western Europe saw a closing of the gap in average prices between countries, in particular because of price reductions in some countries with previously high levels (resulting from their rather small heroin markets, for example, in the Nordic countries) and a stable or slight increase in prices in other countries (see figure V).

V. Illicit production of coca leaf in 1999 and potential availability of cocaine to the world market

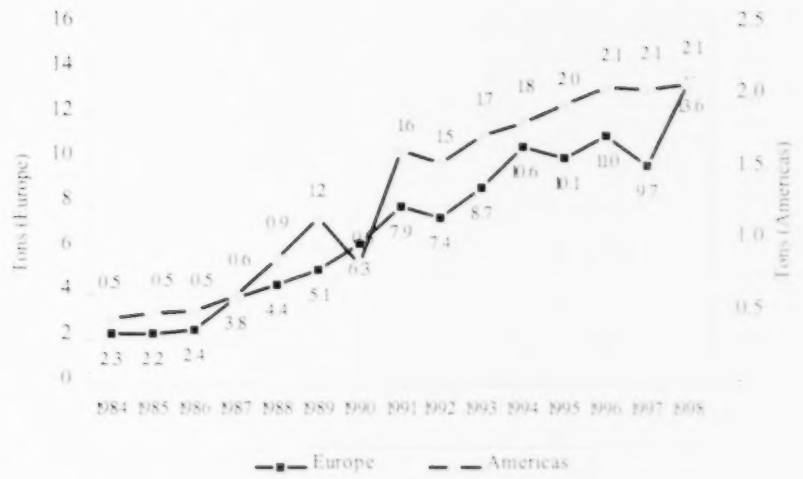
46. Information available to UNDCP on the extent of illicit production of coca leaf is less accurate than that on opium production because of the current absence of reliable surveys on some major source countries (such as the UNDCP *Annual Opium Poppy Survey* for Afghanistan). Thus, a certain margin of error should be allowed for in the following information, which summarizes estimates available from various other sources.

47. Cultivation areas and resulting illicit production of coca leaf declined in Peru throughout the 1990s and in Bolivia mainly in the late 1990s. At the same time, however, cultivation and production increased in Colombia. As a result, total annual world cocaine manufacture remained relatively stable throughout the decade, at around 900 tons. Fluctuations at the global level were only minor, with a peak in 1992/93, followed by a slightly lower production level between 1994 and 1996, but a slight increase in recent years.

48. In 1999, total illicit cocaine manufacture in Colombia was estimated at approximately 580 tons, representing an increase from the level of 1998, when the Government of Colombia reported a total of 560 tons.[6] In Peru, eradication efforts were increasingly strengthened throughout the decade, resulting in significant reductions in cultivation and production. In 1999, however, large abandoned areas of former cultivation were reactivated because of an increase in farm-gate prices of dried coca leaf.[7] Thus, the final level of coca leaf production in 1999 was estimated to have remained relatively stable compared to the previous year, and the potential production level of cocaine was approximately 240 tons. Farm-gate prices in Bolivia were also rising, yet production seemed to have declined by almost 50 per cent in 1999 compared to 1998. Total illicit manufacture of cocaine in Bolivia was estimated at 90 tons in 1999 (see figures VI and VII).

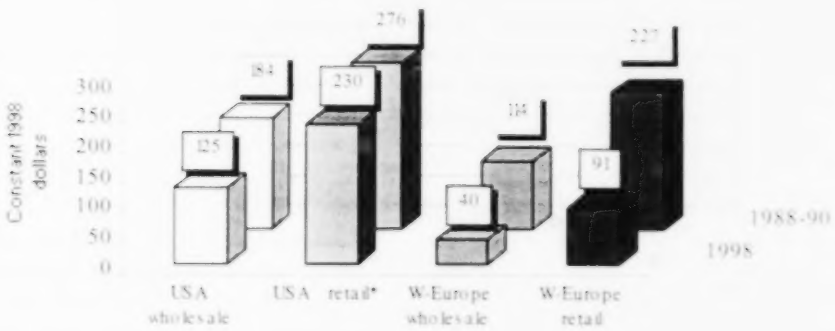
49. As indicated above, farm-gate prices for coca leaf as well as coca base prices seem to have risen in all three source countries in 1999, perhaps because of shortages of cocaine due to eradication efforts. In Bolivia, for example, prices per kilogram of coca leaf ranged between $1.5 and $4.5 at the beginning of 1999 and between $4.4 and $7.2 in October of that year.[8]

Figure IV.
Heroin seizures in Europe and the Americas, 1984-1998



Sources: Annual reports questionnaires and other sources.

Figure V.
Average wholesale and retail prices of heroin in the United States and western Europe, 1988 and 1998
(Inflation-adjusted dollars per gram)



Sources: Annual reports questionnaires and other sources.
*United States retail data for 1998 refer to 1997.

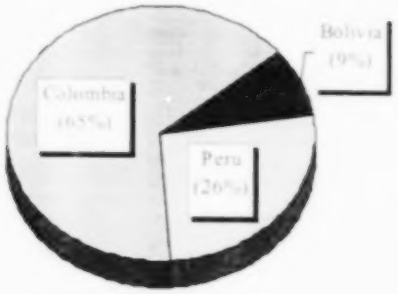
Figure VI

Level of illicit manufacture of cocaine in 1999 compared to 1993

Figure VII

Global illicit manufacture of cocaine, 1999

(Total: approximately 900 tons)



50. It is estimated that the annual potential availability of cocaine to the world market in the 1990s was between 550 and 600 tons (after deduction of a total of 325 tons, the average seizure volume per year, from the total annual production figure of around 900 tons). Thus, the global interception rate for cocaine was generally about one third of the production level.

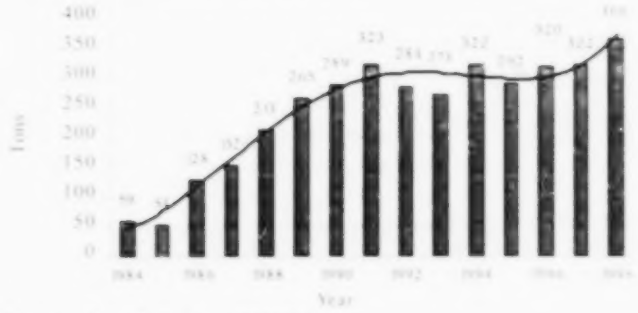
VI. Trends in cocaine trafficking

51. Global seizures of cocaine reached a record level in 1998. Total quantities intercepted climbed to more than 765 tons, a 20 per cent increase over the relatively stable figure that prevailed throughout the 1990s, when seizure levels fluctuated between roughly 280 and 320 tons. That increase, however, was mainly attributable to a large seizure volume in only one country, namely Colombia, while all other regions recorded relatively small changes in 1998 (see figure VIII).

52. Because of the high seizure volume in 1998, the global interception rate was estimated at approximately 40 per cent, a figure significantly above the usual one third of the total production level.

53. Unlike the methods used in the case of opiates, which are primarily trafficked by road, the most commonly used transportation methods for cocaine smuggling continue to be by sea and air. From data available concerning modes of transportation (which, unfortunately, largely exclude the United States), more than 50 per cent of the cocaine seized in 1998 is estimated to have been trafficked by sea, almost 30 per cent by air, and less than 20 per cent by road. About 1 per cent of the total quantities intercepted involved trafficking by mail. In the absence of detailed data from the United States, it is estimated that Colombia accounted for one third, and Spain for approximately 15 per cent, of the seizure volumes relating to sea and air transportation.

Figure VIII.
Global cocaine seizures, 1984-1998



Source: Annual reports questionnaire and other sources.

54. Seizures in Colombia doubled from an annual average 50 tons in previous years to more than 100 tons in 1998. As indicated above, that increase was the only significant change reflected globally. Quantities intercepted in Peru have been slightly decreasing in recent years, while those in Bolivia have shown stable trends. Each of the countries concerned seized about 10 tons of cocaine in 1998. Other countries in South America that continue to report relatively large seizure quantities (between 1.8 and 6.6 tons) include, in the order of volume seized, Brazil, Ecuador, Chile and Argentina.

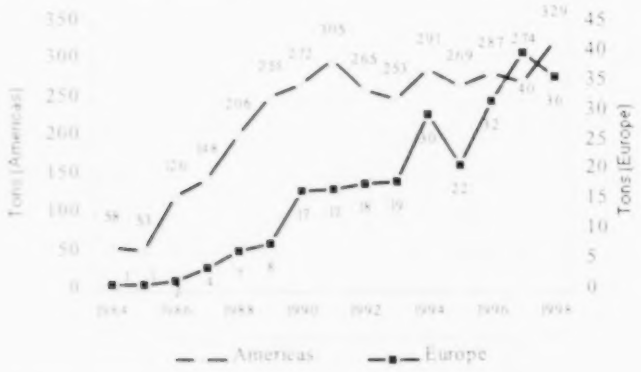
55. In the United States, a total of 120 tons was seized in 1998, which is the average level of recent years, except for 1997, when only 95 tons were seized. While seizures in the United States have remained stable, those in Mexico and Canada have decreased in recent years, to 22 and 0.5 tons, respectively.

56. Countries and territories in the Caribbean that recorded relatively large seizures in 1998 (between 1 and 3 tons) included the Bahamas, the Cayman Islands, the Dominican Republic and, for the first time, the Turks and Caicos Islands. In Central America, total seizure quantities of between 5 and 12 tons were recorded in Costa Rica, Guatemala, Nicaragua and Panama.

57. Cocaine seizures in western Europe rose consistently throughout the decade, reaching 38 tons in 1997. In 1998, however, seizures for the first time slightly declined. Though a one-year change cannot of itself be said to signal the reversal of a trend, past forecasts of a coming cocaine epidemic in Europe might prove unfounded although the latest available data on 1999 indicate a large increase in some countries in western Europe. At the country level, the most significant changes during 1998 were a decrease in Spain and an increase in the Netherlands, both of which seized about 11 tons and together accounted for two thirds of the seizure volume for western Europe as a whole. The large increase in the Netherlands, however, could not offset the decrease in Spain, the latter being primarily responsible for the peak recorded in 1997. Seizures also decreased in Portugal, but increased in the United Kingdom. Other countries in the region that regularly record relatively large seizures, such as France, Germany and Italy, did not report any major changes compared to previous years. Cocaine seizures in Turkey, however, increased significantly, while remaining at a lower level (0.6 tons). That reflects an interesting similarity to heroin seizure trends in western Europe, which were likewise characterized by large increases in the Netherlands and Turkey.

58. In recent years, relatively large seizures were reported by a number of countries in eastern Europe, such as Bulgaria and Ukraine in 1998 and Croatia, Romania and Ukraine in 1996 or 1997. The increased seizures in Turkey and eastern Europe may indicate new European entry points and trafficking routes, with vessels carrying consignments using ports in the Baltic and in the eastern Mediterranean and the Black Sea (see figure IX).

Figure IX
Cocaine seizures in Europe and the Americas, 1984-1998



Source: Annual reports questionnaires and other sources.

59. In Africa, regular cocaine seizure data have been recorded mainly in South Africa, which registered a rising trend throughout the 1990s. More than 600 kilograms were seized in that country in 1998, a significant increase over previous years. Seizures in Nigeria, which were relatively high during the early 1990s, have fallen to a minimum. Data from other countries are not available on a regular basis.

60. In the Near and Middle East, cocaine is seized mainly in Israel and Lebanon. The former intercepted a total of 100 kilograms in 1998, its highest recorded level, while the latter seized smaller quantities in 1997 and 1998 compared to previous years. In east Asia, small seizures of cocaine continue to be reported by Japan.

61. Cocaine prices[7] fell during the 1990s in the two major consumer markets, the United States and western Europe. The largest decline occurred in the United States, however, during the 1980s, while during the 1990s the downward trend lost momentum, with prices becoming more or less stable in the late 1990s. That seems to suggest that the cocaine market in the United States became generally more stable during the 1990s, with supply equalling demand (which is also reflected in the seizure statistics). Cocaine prices in western Europe also showed a continued decline. Though price levels still vary significantly from country to country, the latest data reveal that the price differences are becoming smaller, reflecting a European unification process that also affects the cocaine market. The most significant price decline in 1998 occurred in countries characterized by rather small sales but high prices, such as the Nordic countries. Average cocaine prices in other countries showed a somewhat smaller decline in 1998 (for example, in Austria, Belgium, Luxembourg, Portugal and Switzerland), or remained stable (for example, in Ireland, Germany and Spain) while only two countries reported slight increases (France and the United Kingdom). Some countries, however, recorded a stronger price fall in previous years (for example, in Germany). In general, prices at wholesale levels showed a pattern of decline similar to average prices at the street or retail level during the 1990s, in both the United States and western Europe (see figure X).

VII. Trends in trafficking of cannabis resin

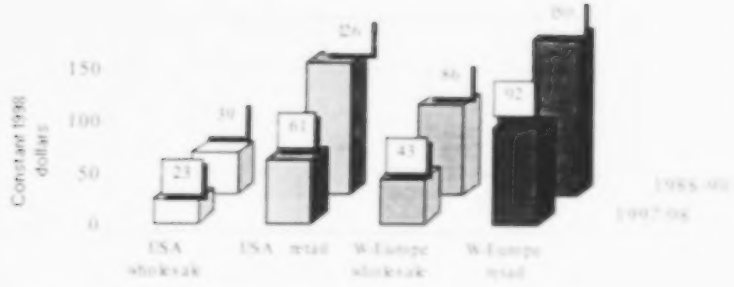
62. Cultivation and wild growth of the cannabis plant is widespread on all continents. However, the main sources of cannabis resin continue to be Morocco and countries in south-west Asia, particularly Pakistan.

63. Global seizures of cannabis resin, which had appeared to be rising over many years, declined in 1996 and 1997. Seizures increased again in 1998 to about 927 tons, the second-highest seizure total ever recorded at the global level (after the 1,100 tons seized in 1995).

Figure X

Average wholesale and retail prices of cocaine in the United States and western Europe, 1988 and 1998

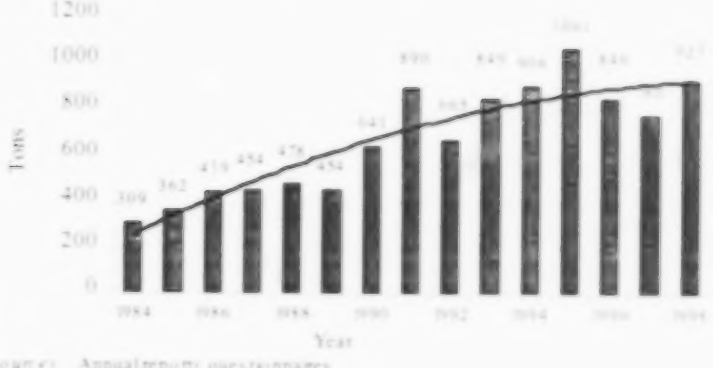
(Inflation-adjusted dollars per gram)



Source: Annual reports questionnaires and other sources.

Figure XI

Global seizures of cannabis resin, 1984-1998



Source: Annual reports questionnaires and other sources

Particular changes in 1998 were noted in western Europe, which accounts for the bulk of seizures, Pakistan and, to a lesser extent, Morocco. While Western Europe, the primary consumer area, showed a large increase in 1998, seizures decreased in Morocco and particularly Pakistan, the two main source countries (see figure XI).

64 Seizures in western Europe have reflected a steady rise since the 1980s, and were particularly high in 1998, reaching a record level of 734 tons. Thus, the share of the region in the global seizure volume continuously increased from about one third during the early 1990s to almost 80 per cent in 1998. Seizure statistics in western Europe suggest a continued increase in the abuse of cannabis resin in the region, as reported in recent years.

65 Countries in western Europe primarily responsible for the large seizures in 1998 were Spain and, to a lesser extent, France, the Netherlands, Portugal and the United Kingdom. Seizures in Spain have risen steadily over the course of many years, reaching 430 tons in 1998. Seizures by Spain steadily increased from one third of the total in

western Europe in the early 1990s to almost 60 per cent in 1998, when Spain also accounted for 46 per cent of global seizures by volume. Preliminary data from the United Kingdom indicate a total of 86 tons seized, which is lower than in 1997 but higher than in previous years. The Netherlands recorded a total of 70 tons and Portugal and France 50 tons each, which is in line with their seizure levels in previous years. Seizures in Italy (15 tons), Germany (6 tons) and Denmark (1.6 tons) continued to show relative stability in recent years. Seizures in Belgium declined considerably in 1998, while those in Norway and Switzerland slightly increased.

66. In eastern Europe, total seizures of cannabis resin have been fluctuating in recent years between 1.5 and 17 tons. In 1998, a total of 9 tons was intercepted, the bulk being in the Ukraine and the remainder in the Russian Federation and the former Yugoslav Republic of Macedonia.

67. Pakistan, a major source of cannabis resin, recorded a decline in seizures in 1997 and an even bigger decline in 1998, when the total of 65 tons seized represented the lowest level recorded by the country since 1984. Seizure data from the Islamic Republic of Iran, which were generally significant (over 10 tons), were not yet available for 1998. The other country in the Near and Middle East to have recorded significant quantities in 1998 was Lebanon (2.5 tons). Seizures in Israel and Jordan have fallen in recent years to almost negligible amounts. In south Asia, India and Nepal intercepted relatively large quantities (8 and 3 tons, respectively). States of central Asia recorded a peak of 22 tons, all of which was intercepted in Turkmenistan. These trends in south and central Asia do not, however, enable any conclusion to be drawn as to whether they are short-term fluctuations or a possible indication of a shift in trafficking and production towards central Asia.

68. The bulk of cannabis resin seizures in Africa are made in Morocco. Seizures have, however, decreased in recent years (though not as much as in Pakistan), amounting to 55 tons in 1998. Other countries in north Africa recording seizures of cannabis resin included Algeria (1.2 tons), Tunisia (800 kilograms), Egypt (63 kilograms) and the Libyan Arab Jamahiriya (470 kilograms).

69. In east and south-east Asia, cannabis resin remains insignificant. The only country regularly recording seizures remains Japan, where the quantities intercepted, though remaining small, have increased in recent years, reaching 200 kilograms in 1998. Viet Nam recorded 380 kilograms during that year.

70. In the Americas, cannabis resin continues to be primarily available in Canada. Seizures there, which have declined in recent years, amounted to 16 tons in 1998. Colombia and Trinidad and Tobago recorded 2.7 tons each. Data from the United States are not available for 1998.

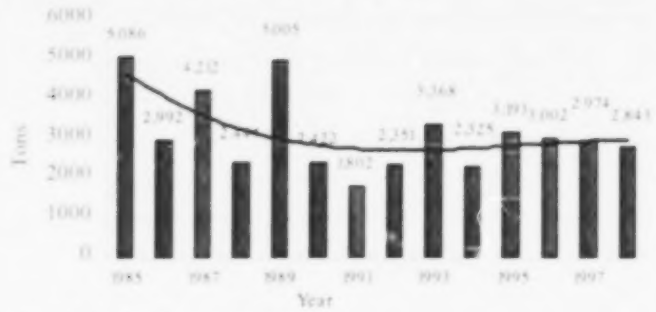
71. Cannabis resin is primarily trafficked by sea and road, both modes accounting for roughly 50 per cent of the total seizure volume in 1998 (as far as data were available on means of transportation). Seizures involving sea transportation were mainly recorded by Spain, followed by a number of other European countries, Morocco and Pakistan. In addition, Canada recorded relatively large interceptions. Road transportation was mainly involved in cannabis resin seizures made in Europe, Islamic Republic of Iran, Morocco and Pakistan.

VIII. Trends in trafficking of cannabis herb

72. Illicit cultivation and wild growth of cannabis continue to be widespread, occurring in all continents, particularly in some countries in Africa, central Asia, south-east and south-west Asia, Latin America and the Caribbean. Estimates with regard to the extent of production of cannabis herb at the country level or worldwide remain unclear. In additional, indoor cultivation of cannabis with a high content of tetrahydrocannabinol using hydroponic technologies is of rising concern in countries in Europe and North America.

73. Annual seizures of cannabis herb, which fluctuated widely at the global level during the 1980s and early 1990s, seem to have levelled off at, or slightly decreased to, approximately 3,000 tons since 1995. Total quantities intercepted in 1998 amounted to 2,850 tons, two thirds of which was recorded in North America. Fluctuations in the years prior to 1995, ranging from 1,800 to 5,100 tons, were mainly due to exceptionally large seizures in southern Africa and South America, both of which have recorded relatively small quantities in recent years (see figure XIII).

Figure XII.
Global seizures of cannabis herb, 1984-1998



Sources: Annual reports questionnaires and other sources.

74. Mexico and the United States account for most of the seizures made in North America. The former recorded large increases in seizures in1995 and 1996 and relatively stable levels in recent years, amounting to more than 1,000 tons annually. The latter had followed a similar trend (though seizures are slightly lower than in Mexico), but surged to 800 tons in 1998.

75. Seizure statistics for cannabis herb reflect the global availability of the drug, with a number of regions and subregions around the world recording relatively high volumes. In 1998, quantities seized in Europe, South America and southern Africa amounted to 230 tons each. Seizures in South America and southern Africa were relatively stable in recent years, though lower than previously. European seizures as a whole had been increasing until the mid-1990s. Since then, however, they have declined in western Europe but risen in eastern Europe. Interceptions in Asia have ranged between 100 and almost 300 tons in recent years.

76. Countries that recorded particularly high quantities of seizures of cannabis herb in 1998 include, in the order of volume seized, Mexico, the United States and, to a lesser extent, South Africa (197 tons), Paraguay (80 tons), Colombia (70 tons), India (62 tons) and the Netherlands (55 tons). Together, those countries accounted for more than 80 per cent of global seizures in 1998.

77. Data with regard to transportation methods were insufficiently reported, particularly by countries in the Americas. The available data, however, show that the trends of recent years have been maintained, with approximately 50 per cent of seizure volumes relating to sea transportation and the other half to road use.

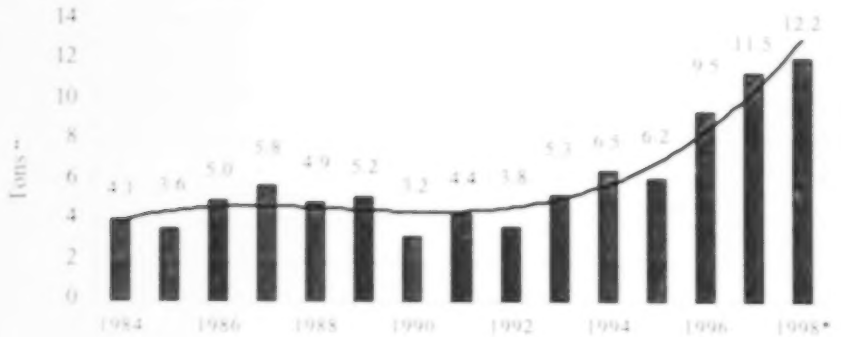
IX. Manufacture and trends in trafficking of psychotropic substances

78. Amphetamine-type stimulants continue to be a major concern in east and south-east Asia, western Europe and North America. Seizures of "stimulants" (mainly amphetamine-type stimulants, excluding the Ecstasy-type substances) rose significantly throughout the 1990s, both globally and in each of the above-mentioned regions. On an assumption of stable seizures in the United States in 1998 (data in respect of which are not yet available), the global seizure volume would appear to have continued to rise to more than 12 tons during that year. The annual seizure level, which was roughly 4 tons throughout the 1980s and at the beginning of the 1990s, started to rise in 1993/94 and reached a crucial point in 1996, when seizures began to escalate, particularly in east and south-east Asia and western Europe. The steeply rising trend since 1996 is also reflected in statistics relating to the detection of clandestine laboratories (see figures XIII and XIV).

79. The largest increase in the volume of stimulants seized in 1998 occurred in east and south-east Asia, which accounted for more than 40 per cent of the global seizure volume for that year. The region has experienced a

Figure XIII

Global seizures of stimulants, 1984-1998



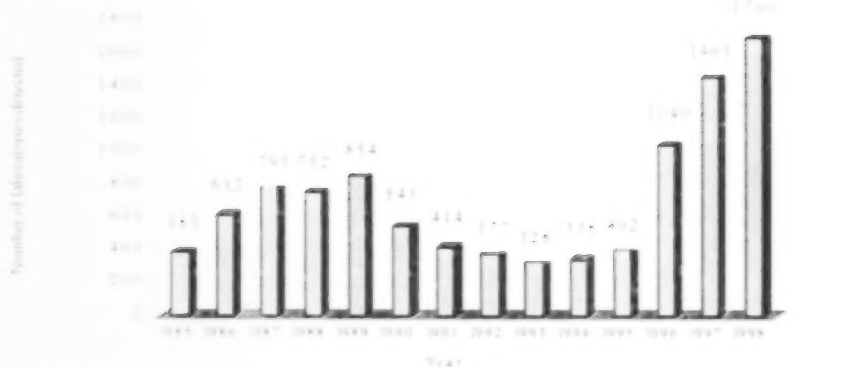
Sources: Annual reports questionnaires and other sources.

*Data reported in units have been converted at a rate of 1 unit = 10 mg.

**Including 1997 figures for the United States.

Figure XIV

Number of detected laboratories manufacturing amphetamine-type stimulants,* 1985-1998



Source: Annual report questionnaires and other sources.

*Including amphetamine, methamphetamine and Ecstasy-type substances.

significant increase in the manufacture, trafficking and abuse of amphetamine-type stimulants, particularly methamphetamine. Since 1995, annual seizure trends have increased sharply, from an average of 1.5 tons in the early 1990s to 5.2 tons in 1998. In 1997 and 1998, Thailand recorded the largest seizure of stimulants by volume in the region, followed by China. Together, they accounted for approximately 80 per cent of the interceptions made. Both countries also had particularly high seizures in previous years. Though at a slightly lower level, seizures in Japan have also increased since 1996. The Philippines recorded relatively large seizures in 1996 and 1997, but that trend has not continued. Seizures reported from the Republic of Korea are much lower, and have remained relatively stable in recent years.

80. In east and south-east Asia, manufacturing activities—of which the number of detected clandestine laboratories serves as an indirect indicator—continue to focus on methamphetamine. China reported a large number of detections of clandestine laboratories in 1995 and 1996, but no report was received for 1997 and 1998. Thailand reported many detections of methamphetamine laboratories in 1997 and 1998. The Republic of Korea continues to detect 2 to 4 laboratories per year, though nothing was reported for 1998. Despite the incomplete availability of clandestine laboratory statistics, it is assumed that illicit manufacture of methamphetamine in east and south-east Asia has reached a high level. Moreover, the criminal groups involved in its manufacture and trafficking often seem to be the same as those involved in the illicit heroin trade.

81. In western Europe, a similar increase in seizures of stimulants has been noted in recent years. Total annual interceptions rose from just above 1 ton at the beginning of the 1990s to 4.8 tons in 1998. The bulk of the seizures of stimulants was regularly recorded by the United Kingdom. However, while a rapidly rising trend was observed throughout the 1990s, preliminary figures for 1998 showed a decrease in that country. During 1998, enormous quantities seized in the Netherlands contributed to an overall continued rise in western Europe. The Netherlands and the United Kingdom together accounted for two thirds of the stimulants seized globally in 1998. Rising trends in recent years and relatively large seizures in 1998 were also recorded in Belgium, Germany, Norway and Spain. Seizures in France and Sweden, however, which had also been rising over a longer period, slightly decreased in 1998.

82. It is amphetamine, rather than methamphetamine, that is mostly manufactured, trafficked and consumed in western Europe, as reflected in statistics on detection of clandestine laboratories. Most detections of illicit amphetamine laboratories have been reported in Germany and the United Kingdom in recent years, whereas previously, such detections were also reported by the Netherlands. Substances of the Ecstasy group are also manufactured in western Europe. Data on laboratory detections involving that drug group were mostly received in recent years from Belgium, Germany, Spain and the United Kingdom.

83. In eastern Europe, the illicit manufacture of methamphetamine seems to be rising most noticeably. The Czech Republic reported the detection of a large number of laboratories manufacturing that drug type throughout the 1990s. In addition, Ukraine detected several clandestine laboratories manufacturing methamphetamine in 1998, and reported the manufacture of Ecstasy-type substances. Illicit amphetamine laboratories in eastern Europe were mainly found in Bulgaria, Poland and the Baltic States in recent years. Poland has been recording regular seizures of increasing quantities, amounting to 50 kilograms in 1998. Seizures during that year were also reported by Hungary, Slovakia, Ukraine and the Baltic States.

84. In North America, seizures of stimulants were almost exclusively recorded in the United States, for which data are not yet available for 1998. During that year, seizures in Canada and Mexico increased, though remaining very small compared to those usually made in the United States. Statistics on illicit manufacture of amphetamine-type stimulants also mainly involved the United States, which by far exceeds all other countries in terms of the number of laboratories detected, mainly for the manufacture of methamphetamine. Detection of clandestine laboratories has increased significantly in the United States since 1996, with another large increase in 1998.

85. Egypt recorded very large seizures of stimulants during the 1980s, amounting to 2 tons on average per year, but interceptions decreased to negligible amounts during the 1990s. The other African country recording regular seizures of stimulants in recent years was Nigeria, which reported more than 300 kilograms in 1997 (data for 1998 are not yet available).

86. Several countries in the Near and Middle East recorded some seizures of stimulants in recent years, though quantities remained low. They included Saudi Arabia and, to a lesser extent, Kuwait and the Syrian Arab Republic.

87. Annual statistics on the seizure of stimulants in Australia, which were above 600 kilograms during the mid-1990s, have decreased in recent years, falling to 180 kilograms in 1998.

88. Apart from some fluctuations, seizures of other psychotropic substances, such as depressants and hallucinogens, have shown little change in recent years, at both the global and the national levels. One exception is Nigeria, which recorded large seizures of depressants in 1996 and 1997 (though no reports were received for 1998).

As for the hallucinogen group, which includes the Ecstasy-type substances, seizures continue to be recorded mainly in western Europe, North America and south-east Asia, which corresponds to the three main markets for amphetamine-type stimulants. Seizures of lysergic acid diethylamide (LSD), which were relatively high in the early 1990s, as well as in 1996 and 1997, declined in 1998. LSD continues to be available, mainly in North America, western Europe and, to a lesser extent, Asia. Methaqualone seizures had been rising rapidly until the mid-1990s, but have declined since 1996. As in the past, the bulk of interceptions in 1998 were made in India and the remainder in South Africa.

X. Reports of the subsidiary bodies of the Commission

89. Following the forty-second session of the Commission, two meetings of its subsidiary bodies were held in 1999. The Ninth Meeting of Heads of National Drug Law Enforcement Agencies (HONLEA), Latin America and the Caribbean, was held in Santiago, from 22 to 26 November 1999 and the Twenty-third Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, was held in Bangkok, from 7 to 10 December 1999.

90. Each meeting, following a review of salient drug trafficking trends and regional and subregional cooperation, addressed drug law enforcement issues of priority concern for the region concerned. Consideration of those issues was facilitated by the discussions that took place during the informal meetings of working groups established for that purpose. The Ninth Meeting of HONLEA, Latin America and the Caribbean, considered the following issues: (a) measures to combat money-laundering; (b) measures to improve the interdiction efforts of law enforcement agencies through an integrated approach to risk assessment, profiling of freight, travellers and transport; and (c) countering corrupt practices within drug law enforcement agencies and improving their effectiveness through the development of good practice, integrity and the conditions of service of drug law enforcement personnel. The Twenty-third Meeting of HONLEA, Asia and the Pacific, examined the following topics: (a) illicit manufacture and distribution of stimulants; (b) illicit trafficking of heroin; and (c) illicit traffic via the mail systems.

91. The recommendations adopted are to be implemented at the national level by the law enforcement agencies attending the meetings. It is the practice of the subsidiary bodies to review the implementation of the recommendations on a biennial basis, with the exception of HONLEA, Europe, which is convened on a triennial basis.

92. The recommendations are contained in the reports of the meetings of the subsidiary bodies, (UNDCP/HONLAC/1999/5 and UNDCP/HONLAP/1999/6). Although the follow-up to the recommendations lies within the competence of the subsidiary bodies, the recommendations presented below, given their specific linkages to the outcome of the twentieth special session of the General Assembly, are brought to the attention of the Commission.

A. Recommendations of the subsidiary bodies

1. Measures to combat money-laundering

93. States are requested to establish and strengthen their cooperation mechanisms, both bilaterally and regionally, with a view to coordinating activities among the institutions engaged in combating money-laundering offences. States are also urged to improve their use of the investigatory techniques employed by supervisory bodies, with a view to tracing suspicious transactions constituting money-laundering offences.

94. States should take steps to organize international forums or seminars, for government officials responsible for the prevention and control of money-laundering, on new trends in the diversion of money or securities, the evaluation of settings and the definition of joint strategies. Collaboration should be promoted between financial institutions and bodies responsible for the control and prevention of money-laundering, with a view to facilitating the detection of suspicious transactions.

95. The measures against money-laundering adopted by the General Assembly at its twentieth special session should be implemented or strengthened, in particular with regard to the undertaking to promulgate legislation and establish national programmes to counter money-laundering by the year 2003.

2. Measures to improve the interdiction efforts of law enforcement agencies through an integrated approach to risk assessment, profiling of freight, travellers and transport

96. States should develop cooperation projects closely linked to relevant areas of the private sector, upgrade and intensify communication between law enforcement agencies at the regional level, and strengthen the opportunities for the interchange of intelligence data.

3. Countering corrupt practice within drug law enforcement agencies and improving their effectiveness through the development of good practice, integrity and the conditions of service of drug law enforcement personnel

97. States that have not yet done so should establish mechanisms for the internal monitoring of the conduct of personnel responsible for drug control and establish a code of professional ethics for officers engaged in combating drug trafficking. Consideration should be given to the recommendations contained in the Seoul Declaration, adopted by the General Assembly of the International Criminal Police Organization in November 1999.

4. Illicit manufacture and distribution of stimulants

98. To ensure their compliance by 2003, the target date set by the General Assembly at its twentieth special session, States should implement the provisions contained in the Action Plan against the Illicit Manufacture, Trafficking and Abuse of Amphetamine-type Stimulants and Their Precursors (resolution S-20/4 A), and establish procedures for the rapid and timely exchange of information related to the verification of parties engaged in commercial transactions of chemicals and their precursors used in the illicit manufacture of amphetamine-type stimulants.

99. Signature analysis should be undertaken on all seizures of amphetamine-type stimulants and the results should be made available to all drug law enforcement agencies, for example, through a focal point established by UNDCP for the region of Asia and the Pacific. The diversion of non-scheduled chemicals, associated precursors and other substances should be punishable as a criminal offence. Drug law enforcement authorities should develop close working cooperation with industry and traders, through the signing of agreements, such as memoranda of understanding, to monitor the licit manufacture and trade in amphetamine-type stimulants and to prevent their loss or diversion to the illicit market.

100. The Commission on Narcotic Drugs should examine, in consultation with the World Health Organization, if needed, the issue of manufacture of ephedrine from sources other than ephedra, drawing on information available from Governments, and sharing its findings with Member States.

5. Illicit traffic in heroin

101. States that have not yet done so should establish a national capacity to collect data and to collate and analyse information on the illicit production, abuse and trafficking of heroin. States should encourage increased cooperation and involvement of drug law enforcement agencies in regional task forces, acting in response to specific operations involving illicit trafficking of significant quantities of drugs, the diversion of their chemical precursors, the laundering of the proceeds of drug trafficking and/or the arrest and prosecution of the principal actors in drug-trafficking operations.

102. Drug law enforcement agencies should continue to develop their capacity for the detection of heroin trafficked by sea through the use of risk analysis techniques, of trade and company profiles and of operational best practice, and through the development of pro-active intelligence and the deployment of the technology required to deal effectively with commercial operations.

6. Illicit traffic via the mail system

103. In response to the significant quantities of drugs illicitly trafficked via the international postal service and express mail systems, and to the profound changes under way in that industry, drug law enforcement authorities should ensure that they have developed close cooperation with the operators of those systems and that their operational response to the threat is appropriate. Drug law enforcement authorities intercepting drugs in mail destined for export, where the quantities of the drugs seized are too small to be considered for a controlled delivery, should pass on details concerning the addressee to the authorities of the State of destination for their advice and action.

104. Drug law enforcement agencies engaged in screening international mail should bring their influence to bear to induce their national postal services to amend the international classification of mail as "Letter Class and Other Articles" (LCOA), separating letters from parcels.

UNDCP was requested to raise the issue of LCOA mail with the Universal Postal Union, with a view to changing the international classification and procedures for dealing with such mail.

B. Other matters brought to the attention of the Commission

105. The attention of the Commission is drawn to the offer of the Government of Myanmar to host the Twenty-fourth Meeting of Heads of National Drug Law Enforcement Agencies, Asia and the Pacific, at a date to be determined by UNDCP and the Government of Myanmar. The Twenty-third Meeting of HONLEA, Asia and the Pacific, accepted the offer of the Government of Myanmar.

Notes:

[a] See UNDCP Country Office in Afghanistan, *Annual Opium Poppy Survey* (Islamabad, 1999).

[b] See UNDCP Field Office in Peru, "Situation report No. 65" (October 1999).

[c] For 1998, data from the United States included in the present document are preliminary and relate to the fiscal rather than the calendar year, although there have been few differences between the two sets of data in recent years.

[d] See UNDCP Country Office in Afghanistan, *Annual Opium Poppy Survey*.

[e] Opium includes opium, morphine and heroin, with a conversion ratio of 10 kilograms of opium for 1 kilogram of heroin and morphine.

[f] Price trends refer to average mid-point data that have been inflation-adjusted and weighted by size of population.

[g] Data provided in the annual reports questionnaire for 1998 submitted by the Government of Colombia.

[h] Based on reports of the UNDCP Field Office in Peru.

[i] Data provided by the Bolivian National Directorate for Agricultural Reconversion.

[j] Cocaine prices are calculated as inflation-adjusted weighted averages.